OPTI

Integrating popular CRMs and payment providers. HubSpot and EasyBill automated invoicing

Case Study

Overview

Industry: Technology
Location: Bucharest, Romania
Output: HubSpot - EasyBill Integration
Date: 2023

About OPTI

✓ Over 15 years of excellence

OPTI Systems was founded in 2005. We have 15 years of experience, hundreds of projects and satisfied clients.

✓ Team of specialists

Our team include analysts, programmers, database and server administrators, project managers and QA engineers.

✓ Based in Bucharest, Romania

Romania is a renowned IT hub. OPTI is ISO 9001 certified and competes for the highest quality standards.
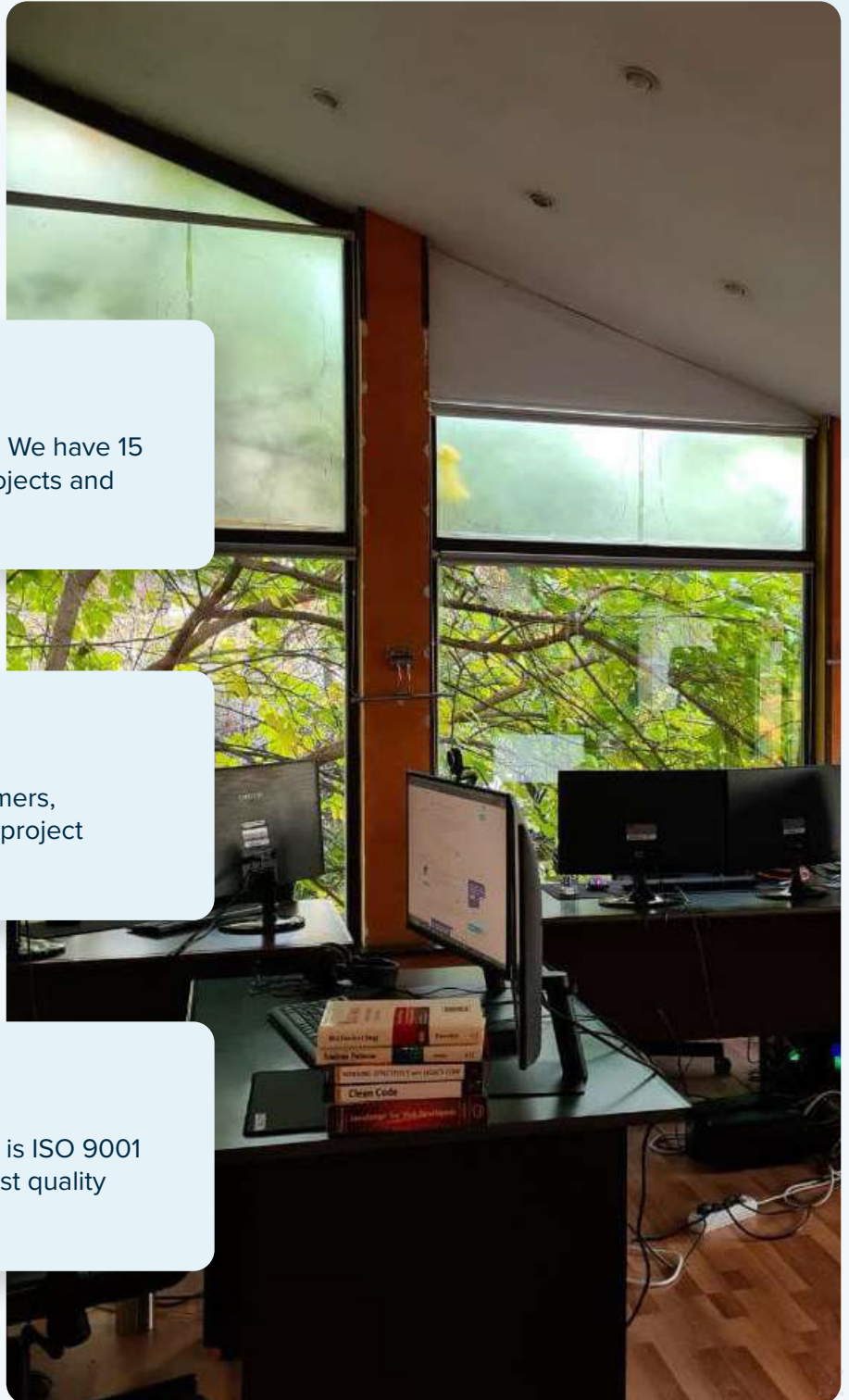
We do software focused on

Digital Transformation

Medical

Educational

Gaming

Background

The customer was experiencing difficult times with manual invoicing and was looking for a new way to increase productivity and provide more flexibility with payment schedules. We collaborated with the client to link HubSpot, the industry leader in CRM platforms, with EasyBill, a versatile invoicing and billing solution. By **automating every step of the invoicing process**—from deal creation to the seamless generation of invoices within the EasyBill platform—client's business efficiency was enhanced.

Challenge

The biggest challenge was the **flexibility of payment plans**. An automated and adaptable solution was needed to **accommodate different billing cycles**, such as one time payment, monthly, annual, once every X period of time.

Solution

Our team collaborated effectively with the client to create complex HubSpot workflows that smoothly integrates with EasyBill, providing a comprehensive solution to invoicing issues. Following the initial lead nurturing and sales phase, the automated process begins, involving specific products and a payment schedule fitting the needs of the end client.

The workflows implemented in HubSpot run multiple steps that integrate with Easibill to create an invoice/quote. Together, these essential milestones create a strong and automated invoicing system that simplifies the process, from the first contract to the preparation and creation of invoices in EasyBill.

The process steps are:

- HubSpot trigger for Invoice/Quote creation
- HubSpot data retrieval
- Data transformation for EasyBill Quote/Invoice creation
- EasyBill data update from HubSpot
- Additional actions

Results

Comprehensive date retrieval

The solution effectively gathers comprehensive data, including deal information, contact details, and product details.

Dynamic data transformation

The workflow creates a structured JSON object from HubSpot data to make sure it works with the EasyBill API.

Effortless Quote and Invoice creation

By using the EasyBill API, the solution eliminates the need for manual intervention by automating the development of professional quotations and invoices.

Consistent data synchronization

The automated system maintains consistency between HubSpot and EasyBill by updating EasyBill data based on the latest information from HubSpot.

Efficiency gains

Manual processes have been replaced, leading to significant time savings and reduced error rates.

Enchanced flexibility

End clients can choose from a variety of payment plans, including monthly, yearly, or customized intervals, providing them with great flexibility.

Contact OPTI Systems

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